



Agency Records Disposition Schedule

Department: Department of Insurance, Financial Institutions and
Professional Registration
Division: Professional Registration

Section: Board of Accountancy
Sub-Section:

TITLE: Annual Permit Renewal Applications

CUTOFF:

DESCRIPTION: Annual Permit Renewal Applications

RETENTION: Years: 10 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Destroy

SERIES: 3395

SERIES STATUS: Approved

APPROVAL DATE:

7/7/1992

TITLE: Certified Public Accountant Application File Deceased

CUTOFF:

DESCRIPTION: Certified Public Accountant Application File Deceased file destroyed upon
Notification

RETENTION: Years: 75 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Destroy

SERIES: 3386

SERIES STATUS: Approved

APPROVAL DATE:

7/7/1992

TITLE: Continuing Education Reports and Audits

CUTOFF:

DESCRIPTION: Continuing Education Reports and Audits

RETENTION: Years: 5 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Destroy

SERIES: 3408

SERIES STATUS: Approved

APPROVAL DATE:

7/7/1992



Agency Records Disposition Schedule

Department: Department of Insurance, Financial Institutions and
Professional Registration
Division: Professional Registration

Section: Board of Accountancy
Sub-Section:

TITLE: CPA and PA firms and Professional Corporations Applications Files

CUTOFF: EOSFY

DESCRIPTION: CPA and PA firms and Professional Corporations Applications Files

RETENTION: Years: Months: Days:

NOTES:

DISPOSITION ACTION: Permanent

SERIES: 3392

SERIES STATUS: Approved

APPROVAL DATE:

7/7/1992

TITLE: CPA examination grade card

CUTOFF:

DESCRIPTION: CPA examination grade card

RETENTION: Years: 75 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Destroy

SERIES: 3390

SERIES STATUS: Approved

APPROVAL DATE:

7/7/1992

TITLE: Index File Cards (CPA, PA, Firms and Prof. Corp.)

CUTOFF: WSO

DESCRIPTION: Index File Cards (CPA, PA, Firms and Prof. Corp.). "Permanent until updated"

RETENTION: Years: 0 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Destroy

SERIES: 3394

SERIES STATUS: Approved

APPROVAL DATE:

7/7/1992



Agency Records Disposition Schedule

Department: Department of Insurance, Financial Institutions and
Professional Registration
Division: Professional Registration

Section: Board of Accountancy
Sub-Section:

TITLE: Public Accountant Application File

CUTOFF:

DESCRIPTION: Public Accountant Application File

RETENTION: Years: 75 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Destroy

SERIES: 3388

SERIES STATUS: Approved

APPROVAL DATE:

7/7/1992

TITLE: Violations and Complaints File

CUTOFF:

DESCRIPTION: Violations and Complaints File

RETENTION: Years: 75 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Destroy

SERIES: 3404

SERIES STATUS: Approved

APPROVAL DATE:

7/7/1992

TITLE: Void Certificates

CUTOFF:

DESCRIPTION: Void Certificates. May be destroyed after conclusion of state audit if
completed before end of retention period.

RETENTION: Years: 3 Months: 0 Days: 0

NOTES:

DISPOSITION ACTION: Destroy

SERIES: 3407

SERIES STATUS: Approved

APPROVAL DATE:

7/7/1992
